Outlook 2013
Getting Started
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How email works at KU

When you join the University of Kansas, you are assigned a KU Online ID, and by default will have an email and calendar account. Your default email address will be your KU-Online-ID@ku.edu, but you can set up an alias at myidentity.ku.edu. An alias is like having a vanity plate for your vehicle and each user can have up to 3 different aliases.

At myidentity.ku.edu, there is also an option to forward your email to a different account. This option is meant for students. Your KU email should be used to conduct all university business-related communications.

- Be wary of using your KU account for personal use and of using your personal account to conduct university business. As much as possible, your personal and business related communications should be kept separate.
- KU IT strongly recommends not forwarding your KU Exchange account to Gmail, etc.
  - It will possibly break your calendaring or create problems with updates.
  - It is not as secure. The off-site provider may not keep your data as secure as our network does.
  - Because KU IT does not support other hosted email accounts, such as Gmail, we are unable to offer support or training for it.

At KU we mostly use Microsoft Office products. This means that Outlook is the preferred software for email and calendaring. In addition, it integrates with Microsoft Lync and Microsoft OneNote and is the only way to create scheduled Lync meetings.

Email at KU is stored on a central server. There are a number of ways you can view your email. These include:

- Outlook Desktop Client
- Outlook Web App (mail.ku.edu)
- Smart Phones and Tablets

Your KU email account has a total of 2 GB worth of storage. However, if needed, you can visit www2.ku.edu/~email/cgi-bin/storageRequest.shtml and sign in to request more space.

As a faculty or staff member, your department technical staff member will help get your email account set up on your primary machine. However, if you choose to connect through your home or mobile device, here are a few helpful links to get you going.

- Configure KU Exchange with Outlook 2010/2013 On Campus
- Configure KU Exchange with Outlook 2013 Off Campus
- Configure KU Exchange on an iPhone
- Configure KU Exchange on an Android
- Configure KU Exchange with Outlook 2011 on a Mac
Email

Email views

Outlook contains many customization options when it comes to viewing your email and calendar. Some of these options include whether or not an email preview is shown, if the Reading Pane is on the right, bottom, or off, and whether the To-Do bar is shown. All of these settings can be changed by clicking on the View tab.

Additionally, you may notice that when you first log into Outlook, your messages are shown as Conversations. This means that any time there is any action taken on an email, such as forwarding or replying, all communications will be contained within the same Conversation list.
How to remove Conversation View:

1. Click on the drop-down arrow next to By Date.
2. Deselect Show as Conversations.

   Note: From this menu, you can also select how emails are sorted. Whether it's by Date, From, or by Category, for example.

Setting up contacts and contact information

Signatures

A signature is a way to sign an email. Multiple signatures can be set up to convey a variety of contact information. Setting up a signature saves time and helps prevent errors when signing an email.

How to create a new signature:

1. Click Mail at the bottom of the screen.
2. Click New Email.
3. Click the Signatures button.
4. Choose Signatures.
5. Click **New**.
6. Type in a name for the signature.
7. Click **Ok**.

8. Type in the signature information under **Edit Signature**
9. Change **default signature** settings to have signatures added to all outgoing emails.

*Note: By default, signatures will not be added to messages unless specified.*

*How to automatically add a signature to a new message or to replies/forwards:*

1. Select a signature in the dropdowns next to both **New messages** and **Replies/forwards** under **Choose default signature**.
Contacts
By default, everyone at KU can be found in the Global Address List. This means that anyone at KU can be searched for and added to a meeting or email. However, if additional information needs to be added to a KU contact or to save contact information for someone external to KU, Outlook contacts can be created. These contacts are stored within individual accounts, however, contact groups can be emailed and shared.

When to add a contact:
- Save contact information for someone external to KU
- Save additional contact information for someone at KU

When not to add a contact:
- If it is a student, faculty or staff member at KU - look them up in the Global Address List

How to create an external contact:
1. Click on People at the bottom of the screen.

For Outlook 2010 Users:
1. Click on Contacts on the bottom left-hand side of the screen.
2. Click on New Contact.

3. Fill in the contact’s information.
4. Click Save & Close.

How to create an internal KU contact:
1. Click on People at the bottom of the screen.
**For Outlook 2010 Users:**

1. Click on **Contacts** on the bottom left-hand side of the screen.
2. Click on **New Contact**.

3. Click on **Address Book**.

4. Type in the last name of the person you are searching for.
5. Click on their name, then choose **OK**.

6. Continue typing any additional information for this contact then choose **Save & Close**.
Contacting a group

At KU, there are three different ways to contact a work group, department, or project team.

- Contact groups in Outlook
- KU Group Lists (a.k.a. distribution lists or DLs)
- Department accounts

Contact groups in Outlook

Using contact groups saves time in creating emails and meetings with the same group of people. The contact group is stored within the individual Outlook account, but can be shared with others.

- Easy to set up within Outlook
- May include non-KU contacts
- Can be shared with other people
- Cannot be located in the Global Address List
- May require more effort to manage the list members
- When a message is sent to an Outlook contact group, it will go to all contacts in the group.

KU Group Lists

- Can only contain members at KU
- KU IT sets up using:
  - Funding code
  - More specialized information, such as hours completed, school, department, building, etc.
- Unless it is built using one of the criteria above, the owner will have to manage the list and contact KU IT to have anyone removed or added.
- Anyone can search for them in the Global Address List and use them. However, the owner can choose to moderate them so that messages have to be approved.
- When a message is sent to a group list, it will go to everyone on the list.

Visit technology.ku.edu/ku-group-lists for more information on how to set up KU group lists/

Department Account

- Is a new account created for a department or unit
- Has a password, email inbox, and calendar associated with it
- Does not automatically get forwarded to all members of the department. Individuals will either need to add the account, be set up as a delegate, or given permissions to view and send email from the account.
- Can only contain members at KU
- Can be located in the Global Address List unless set as private
How to create an Outlook contact group:

1. Click on People at the bottom of the screen.

For Outlook 2010 Users:

1. Click on Contacts on the bottom left-hand side of the screen.

2. Click on New Contact Group

3. Click on Add Members.
4. Choose From Outlook Contacts to add existing contacts, or choose From Address Book to search for and add other KU users.
5. After adding members, click **Save & Close**.

How to create an email or meeting for a contact group:
1. Click on **People** at the bottom of the screen.
2. Double click on the contact group to open it.
3. Choose either **Email** or **Meeting**.
4. A meeting request or email will launch, and the name of the contact group will appear in the **To** area.
5. Proceed with creating the email message or meeting and click **Send**.

Set an out-of-office message
1. Click on **File** to access the backstage.
2. Choose **Automatic Replies (Out of Office)**.
3. Select **Send automatic replies**.
4. Check **Only send during this time range**.
5. Set the **start and end date and time**.
6. Type your message.

You can also choose to send the same or a different message to those outside of your organization.

7. Click on **Outside My Organization**.
8. Choose to send the Auto-reply to those only in your contacts or to anyone outside of the organization.
9. Type your message.
10. Click **OK**.

11. Click on the white arrow in the upper right-hand corner to return to the inbox.
For Outlook 2010 Users:

11. Click on Home to return to the inbox.

Search
The search function can be helpful when trying to find a specific email message or calendar entry. When searching with Outlook 2013, there are many options to help you narrow down your search results. Be sure to click on the dropdown box to view which areas you can search within. Also, look at the search tool options to narrow results by subject, category, etc.

For example, below the search has been limited to from:(johannes) subject:(training) and only searching the Current Mailbox.
Delete unwanted emails

How to delete an individual email:

1. Click on Mail at the bottom of the screen.

2. Click on an email to select it (when an email is selected, it will have a blue box around it).

3. Press Delete on your keyboard.

How to delete multiple emails at once:

1. Click on Mail at the bottom of the screen.

2. Click on an email to select it (when an email is selected, it will have a blue box around it).

3. Press and hold down the Ctrl key on the keyboard.

4. Continue clicking to select multiple emails to be deleted.

5. Release the Ctrl key.

6. Press Delete on the keyboard.
Folders
By default, all incoming emails arrive in the Inbox. To manage and maintain organization, folders can be created within your inbox and emails filed for reference later.

Examples of folders include:
- Personal folder – information from HR/Pay, absence requests, etc.
- Individual folders for people, meetings, or projects

How to create a folder:
1. Right-click on the Inbox folder.
2. Choose New Folder.
3. Type a name for the folder.

   3. Press Enter on the keyboard to save the name.

   ![Name the folder](image)

   **How to file an email within a folder:**
   1. Select an email from the inbox.
   2. Drag and drop the email into a folder.

   *Note: If the folders in the inbox are not visible, click on the small black arrow next to Inbox to expand the list.*
Calendar

Calendar views

Calendars can be viewed and managed in a variety of ways. These include the option to view by day, work week, week, month, and schedule. Views can be changed dynamically by clicking on each of the options.

Individuals with shared or delegated calendars are able to switch the focus to just their calendar or add in the view of the other calendars they have permissions to by selecting the calendars under My Calendars. When switching back and forth, be sure to double-check that you are modifying the correct calendar.

If others have shared their calendars, or delegated access, their calendars will show under My Calendars. Be sure to be mindful of the calendar that you are looking at or possibly making modifications in.
Share calendars

**Delegation vs. Calendar Sharing vs. Calendar Permissions**

When you share a calendar with a co-worker, it is seen as more of an FYI of their days/weeks ahead. With the added options within calendar permissions, you have the ability to choose just how much of your calendar your co-worker sees.

If someone delegates a calendar or email to you, you are then responsible for helping to manage either calendar entries or email messages. As a delegate of someone’s Outlook account, emails and meetings will include the information that they are “sent on the behalf of (the person to whom you are a delegate)” instead of coming directly from your account.

**How to add a delegate:**

1. Click on **File** to access the backstage view.
2. Choose **Account Settings**.
3. Choose **Delegate Access**.

![Click on File to access the backstage view.](image1)

![Click on Account Settings, then choose Delegate Access.](image2)
4. Click Add.

5. Search for the intended delegate by typing their last name in the search field.
6. Click on the delegate’s name.
7. Click Add ->.
8. Click OK.
1. Choose the desired permissions for the delegate.
2. Click **OK**.

3. Click **OK** again.
4. Click the white arrow in the upper right-hand corner to return to the inbox.

For Outlook 2010 Users:

4. Click on **Home** to return to the inbox.
How to use Calendar Sharing:

1. **Click on** Calendar **at the bottom of the screen.**

2. **Click on the** Share Calendar **button.**

3. **Find and choose the recipients using the Global Address List by clicking To,** type in the last name of the intended recipient, **click on their name to select them,** **click To ->,** **then click OK.**
4. Choose to **Request permission to view recipient’s Calendar** and/or **Allow recipient to view your Calendar**.
5. Choose the level of detail the recipient will view on your calendar if you choose to allow them to view your calendar.

6. Type in any additional information.
7. Click **Send**.
How to use Calendar Permissions:

1. Click on Calendar at the bottom of the screen.

2. Choose Calendar Permissions.

3. Select someone that has share access to the calendar, or add someone new by clicking Add, type in the last name of the intended recipient, click on their name to select them, click Add ->, then click OK.

4. Edit their rights/access.

5. Click OK.
Accept meetings

Best practices

- Accept, decline, or tentatively accept a meeting while the meeting is in the **Inbox** so the organizer knows that the meeting time will work for everyone.
- Decline a meeting before deleting it.

How to accept a meeting:

1. Click on the **Inbox** folder.
2. Select the meeting request by clicking on it.
3. Choose **Accept**, **Tentative**, or **Decline**.
4. Choose to either **edit your response before sending** it, or **send the response now**.
   a. For example: *I may Accept a meeting but edit my response to say that I will be 15 minutes late before I send my accepted response.*
5. After accepting or declining a meeting, it can be found in the **Sent** items folder.
Schedule meetings
Creating a meeting or appointment is a way to block out time for an event. An appointment is useful for an individual to block off time in his/her calendar for personal project work or reminders. Meetings are used when multiple people will be attending.

By default, creating an appointment or meeting will also notify the attendees before the event starts. When meeting with a group, it is best to send out a meeting invite. This serves as a communication tool and allows the organizer and attendees to view acceptance status of others. If the meeting should be canceled or the location changed, the organizer can update the meeting request to inform all attendees.

How to create an appointment:
1. Click on Calendar at the bottom of the screen.

2. Click New Appointment.
3. By default, appointments will only include you as the intended recipient. Type in the Subject, Location, Start and End Times and, if necessary, change the Show as option and Categorize the appointment. Additionally, click Private to limit what others can see (for an example, a doctor’s appointment).
   
   a. Note: When you create an All Day Event, it will default to Show As: Free. If you are scheduling a vacation day, for example, be sure to change it to Show As: Busy so that others can correctly view your free/busy time.

4. Click OK.
5. The appointment should now be added to your calendar at the specified date and time.
How to create a meeting:

1. Click on Calendar at the bottom of the screen.

2. Choose New Meeting.

3. Click To... to add attendees.
4. To search the global address list, type in the last name of the attendee.
5. Select the attendee from the list.
6. Click **Required ->**.

7. To locate an individual in a contact group, use the dropdown to select **Contacts**. This will display the contacts and contact groups that have been created for this Outlook Account.
8. Select the **contact or contact group** from the list of contacts.
9. Click **Required ->**.
10. Click OK.
11. Type in the **Subject** of the meeting.
12. If rooms are scheduled using the automated resource booking, click on **Rooms...** to view the availability of a room and send the room a meeting request to reserve it.

13. Type in the name of the room.
14. Select the room.
15. Click **Rooms ->**.
16. Click OK.

17. Select the desired **start and end date/times.**
18. Verify availability using the **Scheduling Assistant**.

19. Click **Send**.

**How to create a Lync meeting:**
Lync meetings can be created in addition to or instead of physical in-person meetings.

1. Click on **Calendar** at the bottom of the screen.
2. Choose **New Lync Meeting**.
3. Click **To...** to add attendees.
4. Type in the **Subject** of the meeting.
5. By default, the location will appear as **Lync Meeting**. If you are also holding an in-person meeting at the same time, add the room and reserve it as you normally would.
6. Select the desired **start and end date/times**.
7. Verify availability using the **Scheduling Assistant**.
8. An automatically generated footer will appear with a hyperlink to the online meeting and a phone number and conference ID to join by phone. **NOTE**: Do not modify any of the existing text in the meeting request. Doing so may prevent people from joining the meeting.
9. Click **Send**.

**Scheduling Assistant**
To view the availability of the attendees and room and to ensure that the selected start and end date and times will work for everyone, click the **Scheduling Assistant** button.
Note: If you are sending a meeting to a contact group, you must first expand the contact group to see the availability of individual members. Click OK if you receive the Expand List notification.

Recurring meetings
When a meeting occurs frequently, it is best to create a recurrence in place of individual meetings. However, it is important to note that it is best practice to always put an end date on the recurrence.

How to create a recurring meeting:
1. Click on Calendar at the bottom of the screen.

2. Choose New Meeting.
3. Add the attendees and room.
4. Click on the **Recurrence** button.

5. Set the appointment **start and end times**.
6. Set the **duration**.
7. Choose the **Recurrence pattern**.
8. Choose how often the meeting will occur and select the days on which the meeting will take place.
9. Set the **start date** of the occurrences.
10. Set either the **number of occurrences**, or set an **end date**.
    a. For example: The recurrence below is set to happen from 8:00 AM – 9:00 AM every week on Tuesday. It is set to start on 3/25/2014 and end after 10 occurrences, or after 5/27/2014.

11. Click **OK**.
Edit scheduled meetings

Scheduled meetings can be edited at any point before the meeting has started and those updates can be sent to attendees.

How to edit scheduled meetings:
1. Click on Calendar at the bottom of the screen.

2. Find the meeting on the calendar.
3. Double-click on the meeting to open it.
   a. Note: If the meeting is recurring, first choose to edit either just the occurrence or the entire series of meetings.

4. Make any necessary changes (i.e., meeting location, meeting time, additional notes, etc.).
5. Attach a file (agenda, etc.) by clicking **Insert**.
6. Choose **Attach File**.
7. Browse the computer and select the file.
8. Click **Insert**.
9. Click **Send Update**.

To attach a file, click Insert then choose Attach File. After making adjustments to the meeting and adding files, click Send Update.